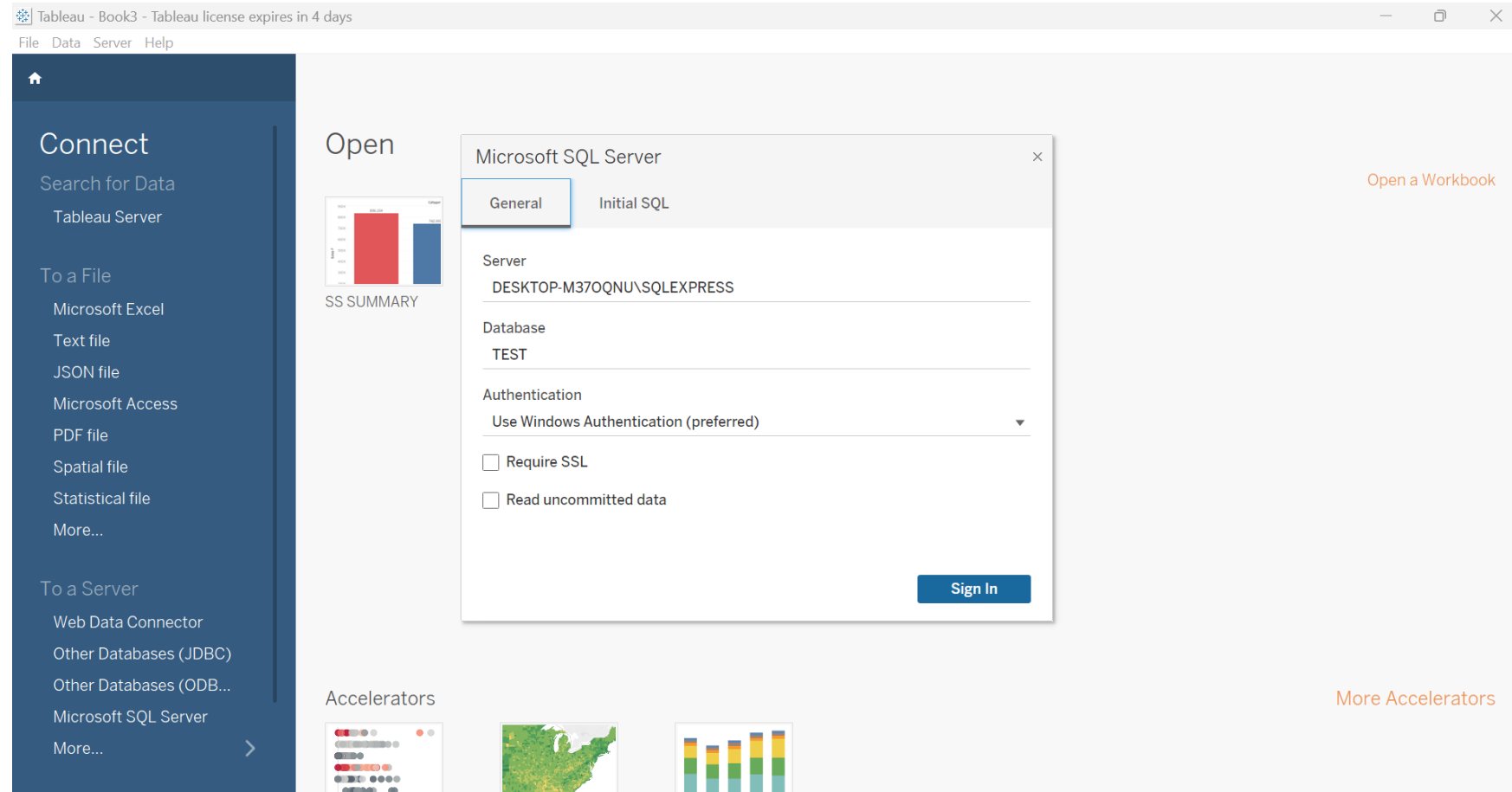


Connecting to SQL Server

In the list of available sources select Microsoft SQL Server. Specify the server name and optionally the database name.



The screenshot shows the Tableau Desktop interface. On the left, the 'Connect' pane is visible with options for 'Tableau Server', 'To a File' (including Microsoft Excel, Text file, JSON file, Microsoft Access, PDF file, Spatial file, Statistical file, and More...), and 'To a Server' (including Web Data Connector, Other Databases (JDBC), Other Databases (ODBC), Microsoft SQL Server, and More...). The 'Microsoft SQL Server' option is selected. In the center, the 'Open' dialog box is open, showing the 'General' tab. The 'Server' field is set to 'DESKTOP-M37OQNU\SQLEXPRESS', the 'Database' field is set to 'TEST', and the 'Authentication' dropdown is set to 'Use Windows Authentication (preferred)'. There are checkboxes for 'Require SSL' and 'Read uncommitted data', both of which are unchecked. A 'Sign In' button is at the bottom right of the dialog. In the background, a bar chart titled 'SS SUMMARY' is visible. On the right side of the interface, there are links for 'Open a Workbook' and 'More Accelerators'.

Tableau - Book3 - Tableau license expires in 4 days

File Data Server Help

Connect

Search for Data

Tableau Server

To a File

- Microsoft Excel
- Text file
- JSON file
- Microsoft Access
- PDF file
- Spatial file
- Statistical file
- More...

To a Server

- Web Data Connector
- Other Databases (JDBC)
- Other Databases (ODBC...)
- Microsoft SQL Server
- More...

Open

SS SUMMARY

Microsoft SQL Server

General Initial SQL

Server

DESKTOP-M37OQNU\SQLEXPRESS

Database

TEST

Authentication

Use Windows Authentication (preferred)

☐ Require SSL

☐ Read uncommitted data

Sign In

Open a Workbook

More Accelerators



Connecting to SQL Server

Select the required table from the table list and drop it in the data area.
Click on Update Now or Update Automatically to get the data.

Tableau - Book3 - Tableau license expires in 4 days

File Data Server Window Help

Connections [Add](#)

DESKTOP-M37... \SQLEXPRESS
Microsoft SQL Server

Database
TEST

Table
All 407 Recommended

emp

Emp
EMP2
emp2
New Custom SQL
New Union
New Table Extension

Stored Procedures
AD_EMP
ADD_EMP
ADD_EMP_SAL
ADD_SAL
ADD_STU

[Go to Worksheet](#)

Data Source **Sheet 1**

Emp (TEST)

Connection
☒ Live ☐ Extract

Filters
0 [Add](#)

Recommended Data Sources 0

Emp

Need more data?
Drag tables here to relate them. [Learn more](#)

Emp

rows

Update Now

Update Automatically

Emp EID	Emp Name	Emp Address1	Emp Address2	Emp City	Emp Phone No	Emp Email	Emp DOB
1001	RAMESH GUPTA	SECTOR 7	Rohini	DELHI	99990027		
1002	Sandeep Sharma	SECTOR 2	PALAM	GURGAON	9567890C		
1003	Rajesh Sharma	Sector 11	Dwarka	DELHI	9999001C		
1004	Yogeshwar Sharma	Sector 11	Dwarka	DELHI	8899001C		



Connect using SQL Queries

Using SQL queries we can connect to you can connect to a specific query rather than the entire data set

 New Custom SQL

Edit Custom SQL

×

```
select emp.eid, NAME, CITY, DOJ, DOB, DEPT , DESI, SALARY  
FROM EMP  
INNER JOIN EMP_SAL  
ON EMP.EID=EMP_SAL.EID
```

Preview Results...

Insert Parameter ▼

OK

Cancel



Parameterized SQL Queries

In addition to simple Queries we can make a dynamic query using parameters

The screenshot shows the Tableau Desktop interface with a custom SQL query window open. The query is a SELECT statement joining EMP and EMP_SAL tables. A 'Create Parameter' dialog is overlaid on the query window, showing the configuration for a new parameter named 'Parameter 1'.

Custom SQL Query (TEST)

```
select emp.eid, NAME, CITY, DOJ, DOB, DEPT , DESI, SALARY
FROM EMP
INNER JOIN EMP_SAL
ON EMP.EID=EMP_SAL.EID
```

Create Parameter Dialog:

- Name: Parameter 1
- Data type: Float
- Current value: 1
- Value when workbook opens: Current value
- Display format: Automatic
- Allowable values: ☒ All ☐ List ☐ Range

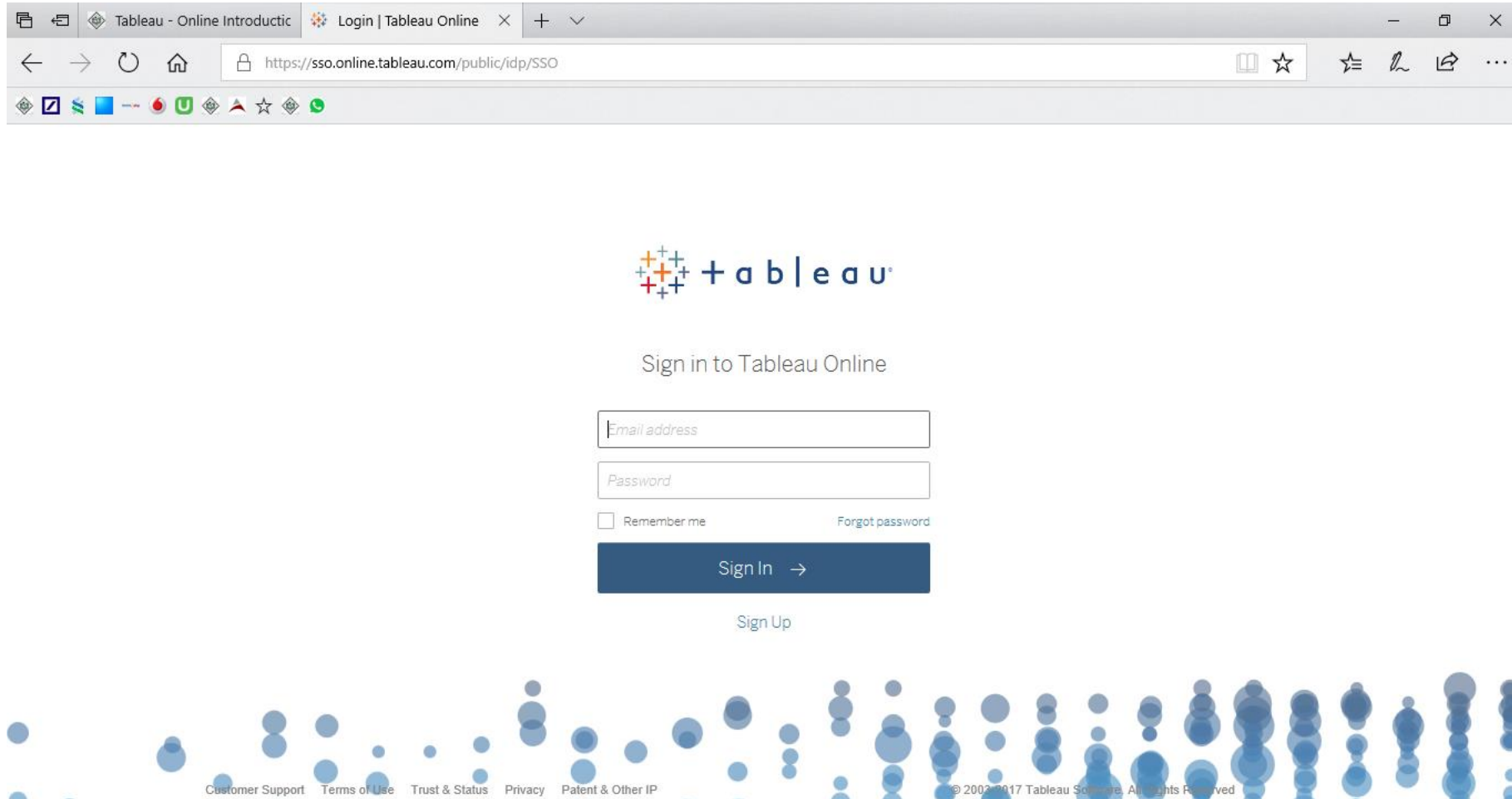
Data Source Table:

eid	NAME	CITY	DOJ	DOB	DEPT	DESI	SALARY
1005	Manoj Kumar	DELHI	3/1/2018	10/11/1983	HR	ASSOCIATE	66,000
1007	Kapil Sharma	GURGAON	1/2/2017	10/10/1989	HR	ASSOCIATE	71,500
1011	AMIT KAPOOR	DELHI	12/12/2018	10/5/1990	HR	ASSOCIATE	35,000
1012	MONIKA ARORA	DELHI	12/12/2018	10/21/1989	HR	SR. ASSOCIATE	50,000
1019	RAJAT KAPOOR	DELHI	12/12/2018	10/10/1989	HR	ASSOCIATE	55,000
1020	Rohan Kumar	DELHI	1/2/2017	10/10/1989	HR	ASSOCIATE	71,500
1035	MANOJ TIWARI	GURGAON	12/12/2018	10/5/1990	HR	ASSOCIATE	35,000
1037	MIKE	DELHI	12/12/2018	10/21/1989	HR	SR. ASSOCIATE	50,000
1050	AMAN MUDGAL	DELHI	12/12/2018	10/10/1989	HR	ASSOCIATE	55,000



Tableau Online


Tableau online is a platform to share our report / analysis with different people.



The screenshot shows a web browser window with the address bar displaying `https://sso.online.tableau.com/public/idp/SSO`. The page features the Tableau logo at the top, followed by the text "Sign in to Tableau Online". Below this, there are two input fields: "Email address" and "Password". A checkbox labeled "Remember me" and a link "Forgot password" are positioned below the password field. A large blue "Sign In" button with a right-pointing arrow is centered below the inputs. A "Sign Up" link is located directly beneath the "Sign In" button. The footer of the page includes links for "Customer Support", "Terms of Use", "Trust & Status", "Privacy", and "Patent & Other IP", along with the copyright notice "© 2002-2017 Tableau Software. All Rights Reserved".

Tableau - Online Introductic Login | Tableau Online

https://sso.online.tableau.com/public/idp/SSO

 + a b | e a u

Sign in to Tableau Online

Email address

Password

☐ Remember me [Forgot password](#)

Sign In →

[Sign Up](#)

[Customer Support](#) [Terms of Use](#) [Trust & Status](#) [Privacy](#) [Patent & Other IP](#)

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Projects , Workbooks, Views, Data Sources

Users, Groups, Status, Settings



Tableau Online

Tableau online- the home page.

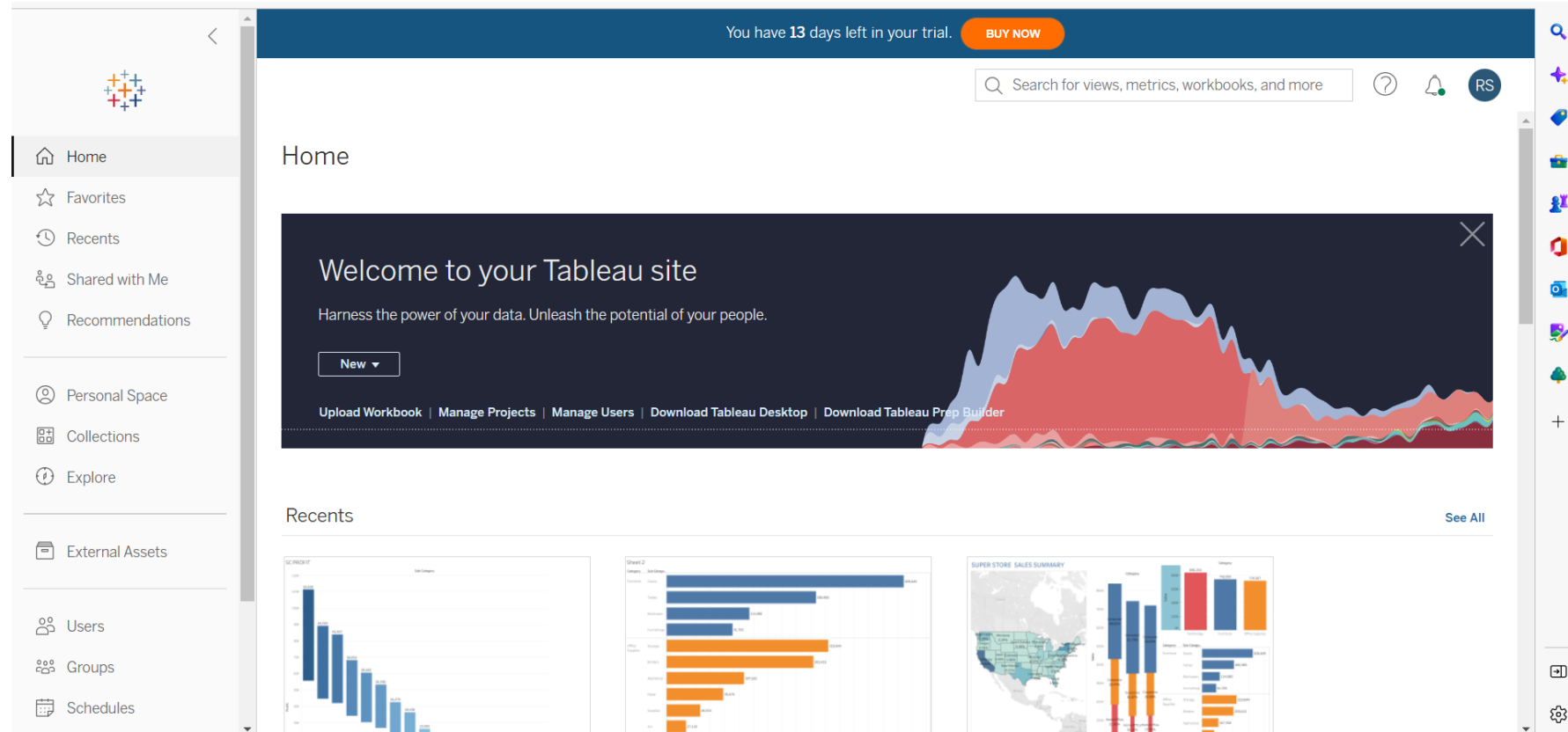


Tableau Online

Tableau online- the home page.

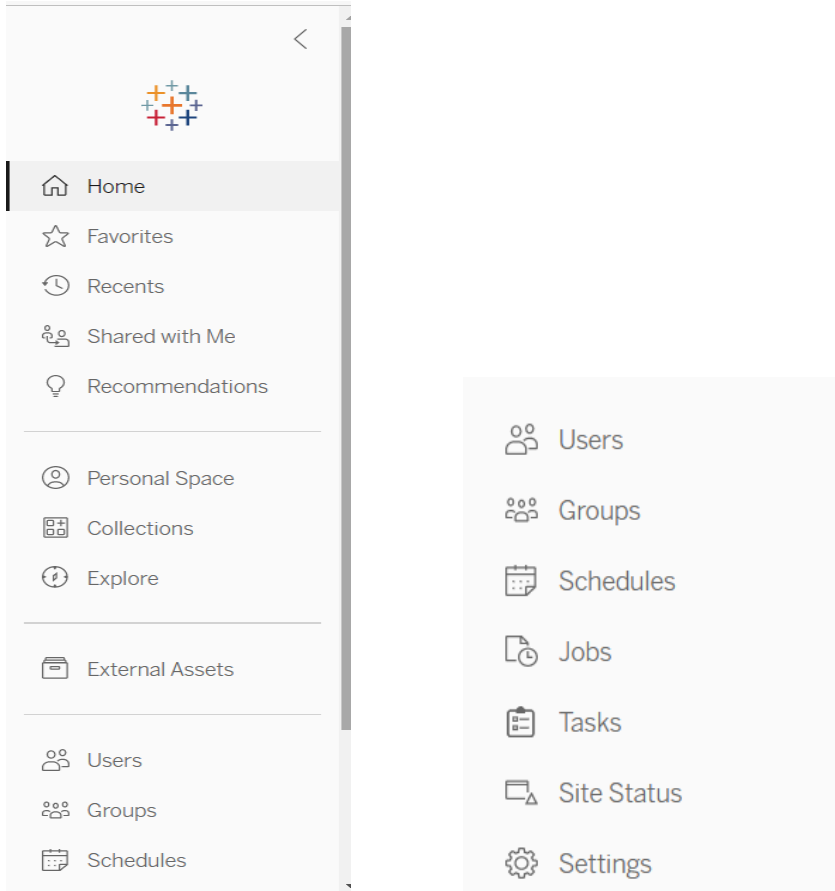
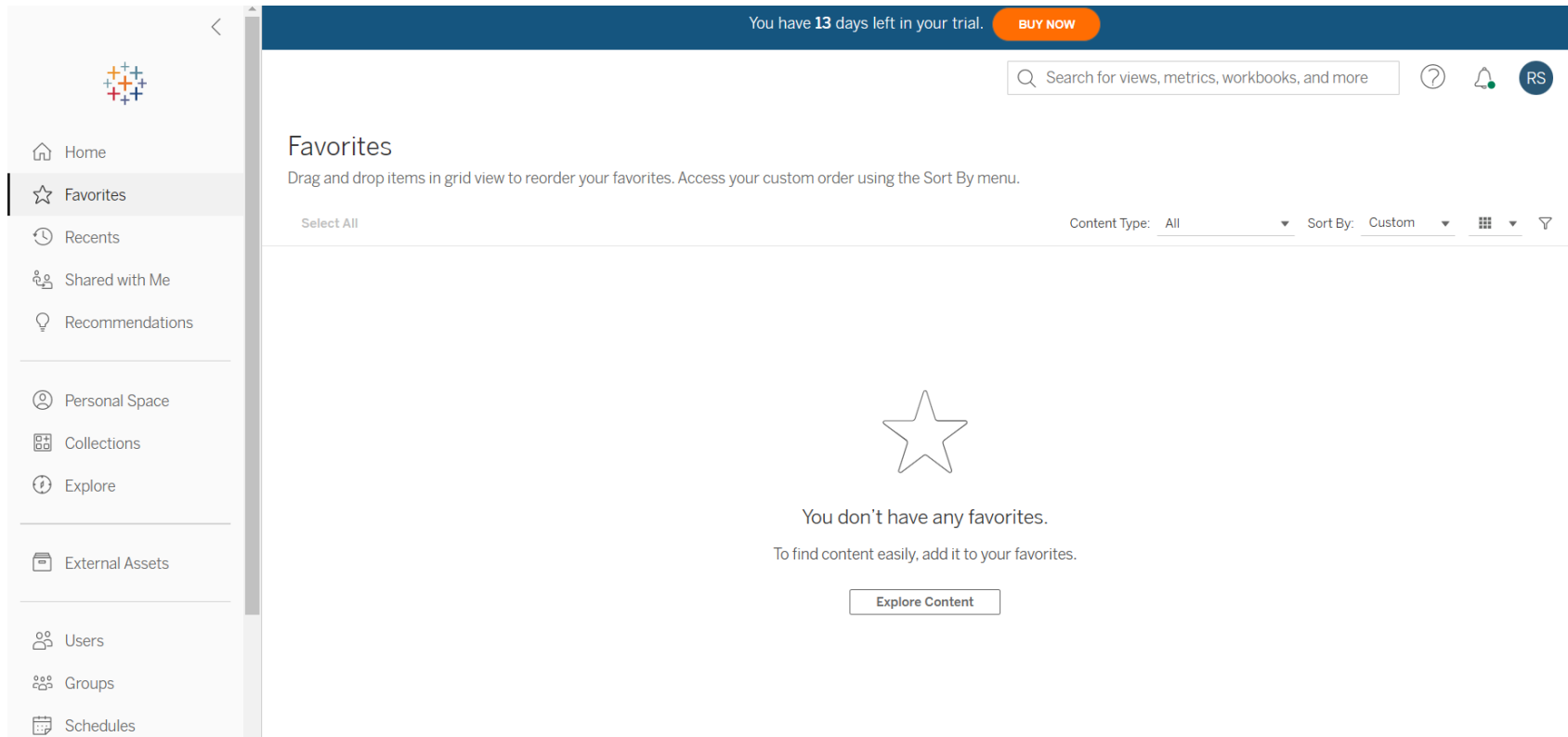


Tableau Online

The visuals which we use frequently can be added as the Favorites. Just like we add some website as favorites in our browser.



The screenshot displays the Tableau Online interface. On the left is a navigation sidebar with icons and labels for Home, Favorites (which is highlighted), Recents, Shared with Me, Recommendations, Personal Space, Collections, Explore, External Assets, Users, Groups, and Schedules. The main content area at the top features a dark blue header with a trial notice: "You have 13 days left in your trial." and a "BUY NOW" button. Below this is a search bar with the placeholder text "Search for views, metrics, workbooks, and more" and icons for help, notifications, and a user profile labeled "RS". The "Favorites" section title is followed by a subtitle: "Drag and drop items in grid view to reorder your favorites. Access your custom order using the Sort By menu." Below the subtitle are controls for "Select All", "Content Type: All", "Sort By: Custom", and view toggles for grid, list, and filter. The central area contains a large outline star icon and the text "You don't have any favorites." and "To find content easily, add it to your favorites." with an "Explore Content" button.



Tableau Online

Recents - Recently used visuals will be displayed under this section.

Home

Favorites

Recents

Shared with Me

Recommendations

Personal Space

Collections

Explore

External Assets

Users

Groups

Schedules

You have 13 days left in your trial. [BUY NOW](#)

Recents

Select All

Sort By: Last Accessed At (newest) ↓

SC PROFIT
44 minutes ago

Sheet 2
1 hour ago

Dashboard 1
1 hour ago



Tableau Online

Shared with Me – Visuals shared by any user will be appearing in this section.

The screenshot displays the Tableau Online user interface. On the left is a navigation sidebar with icons and labels for Home, Favorites, Recents, Shared with Me (which is highlighted), Recommendations, Personal Space, Collections, Explore, External Assets, Users, Groups, and Schedules. The main content area at the top features a dark blue header with a trial notice: "You have 13 days left in your trial." followed by a "BUY NOW" button. Below this is a search bar with the placeholder text "Search for views, metrics, workbooks, and more" and user profile icons. The "Shared with Me" section is active, showing a "Select All" button and a grid view of a visualization titled "SUPER STORE SALES SUMMARY". This visualization includes a map of the United States, a bar chart showing sales by region, and a horizontal bar chart showing sales by product category.



Tableau Online

Explore— This section is used to see what is there on the website.
Projects are the folders which contains the visuals

The screenshot displays the Tableau Online 'Explore' page. On the left is a sidebar with navigation links: Favorites, Recents, Shared with Me, Recommendations, Personal Space, Collections, Explore (highlighted), External Assets, Users, Groups, Schedules, Jobs, Tasks, Site Status, and Settings. The main area features a dark blue header with a trial notice: 'You have 13 days left in your trial. BUY NOW'. Below the header is a search bar with the placeholder text 'Search for views, metrics, workbooks, and more'. The 'Explore' section is titled 'Top-Level Projects' and includes a 'New' button and a 'Select All' link. A 'Sort By' dropdown is set to 'Name (a-z)'. Three project cards are shown: 'default' (The default project that was automatically created by Tableau), 'DEMO' (THIS IS MY FIRST PROJECT ON SUPER STORE), and 'Samples' (This project includes automatically uploaded samples). Each card has a star icon and a menu icon.



Tableau Online

Users – This tab displays the list of the users of the website. Any no of users can be added to the respective website.

The screenshot displays the Tableau Online 'Users' management page. The left sidebar contains navigation options: Favorites, Recents, Shared with Me, Recommendations, Personal Space, Collections, Explore, External Assets, Users (selected), Groups, Schedules, Jobs, Tasks, Site Status, and Settings. The main content area shows a list of users with the following columns: Actions, Username, Site role, Authentication, and Last signed in. A modal window titled 'Add Users' is open, showing options for adding users (Tableau with MFA or Tableau) and a text input field for email addresses.

Users 3
Creator: 1/25 Explorer: 2/0 Viewer: 0/0

Add Users Select All

Add Users by Email
Import users from file

	Actions	Username	Site role	Authentication	Last signed in
<input type="checkbox"/> PB Pallavi Bhat	...	PALLVISBHAT@GMAIL.COM	Explorer (can publish)	Tableau	Mar 13, 2023, 10:09 AM
<input type="checkbox"/> PG Prajwal Goswami	...	goswamiprajwal78@gmail.com	Site Administrator Creator	Tableau	Mar 13, 2023, 10:07 AM
<input type="checkbox"/> RG rajeev garg	...	RAJEEV@RCORPGINIE.COM	Explorer (can publish)	Tableau	

Add Users

☐ Tableau with MFA
Users will receive an invite email that contains a link to the site and instructions to set up their Tableau ID.

☒ Tableau
Users will receive an invite email that contains a link to the site and instructions to set up their Tableau ID.

Enter email addresses

Click here and type email addresses separated by semicolons

Site role: Explorer (can publish)

Cancel **Add Users**



Tableau Online

Tableau online is a platform to share our report / analysis with different people.

User Site Roles :

- Site Administrator Creator – Full Control
- Creator - Full Control Can not change permissions
- Site Administrator Explorer – Cant connect to external data
- Explorer (can publish) Can publish however, can not connect to external data and create new data sources
- Explorer – cant save the work
- Viewer – read only access can download
- Unlicensed – not allowed to publish any thing



Publishing

Publishing the projects on to Tableau online. What we have created on Tableau desktop we need to publish it on Tableau Online.

Tableau - > Server -> SignIn

After login to tableau Online click on publish Workbook.



Publishing

In the popup box provide the below information:

- Project : Name of the Project in Tableau Online in which the workbook needs to be published.
- Name : Name of the Work Book to be displayed in Online
- Description : Short description about the project.
- Sheets: Specify the sheets to be published.
- Tags: Specify the key words that can be used to search the respective workbook
- Permissions : Set the permissions for the workbook.
- Data Source s: Specify how to publish the dashboard as a part of workbook / separately.
- Show Sheets as tabs – Display sheets tabs on Tableau Online
- Show Selections – Only selected sheet will be displayed



Publish Workbook to Tableau Online

Project

Demo

Name

SuperStore|

Description

This is my first project for Super Store Sales summary

Tags

profit

region

sales

5 Tags

Sheets

All Edit

Permissions

Set to existing workbook default Edit

Data Sources

1 embedded in workbook Edit

More Options

☐ Show sheets as tabs

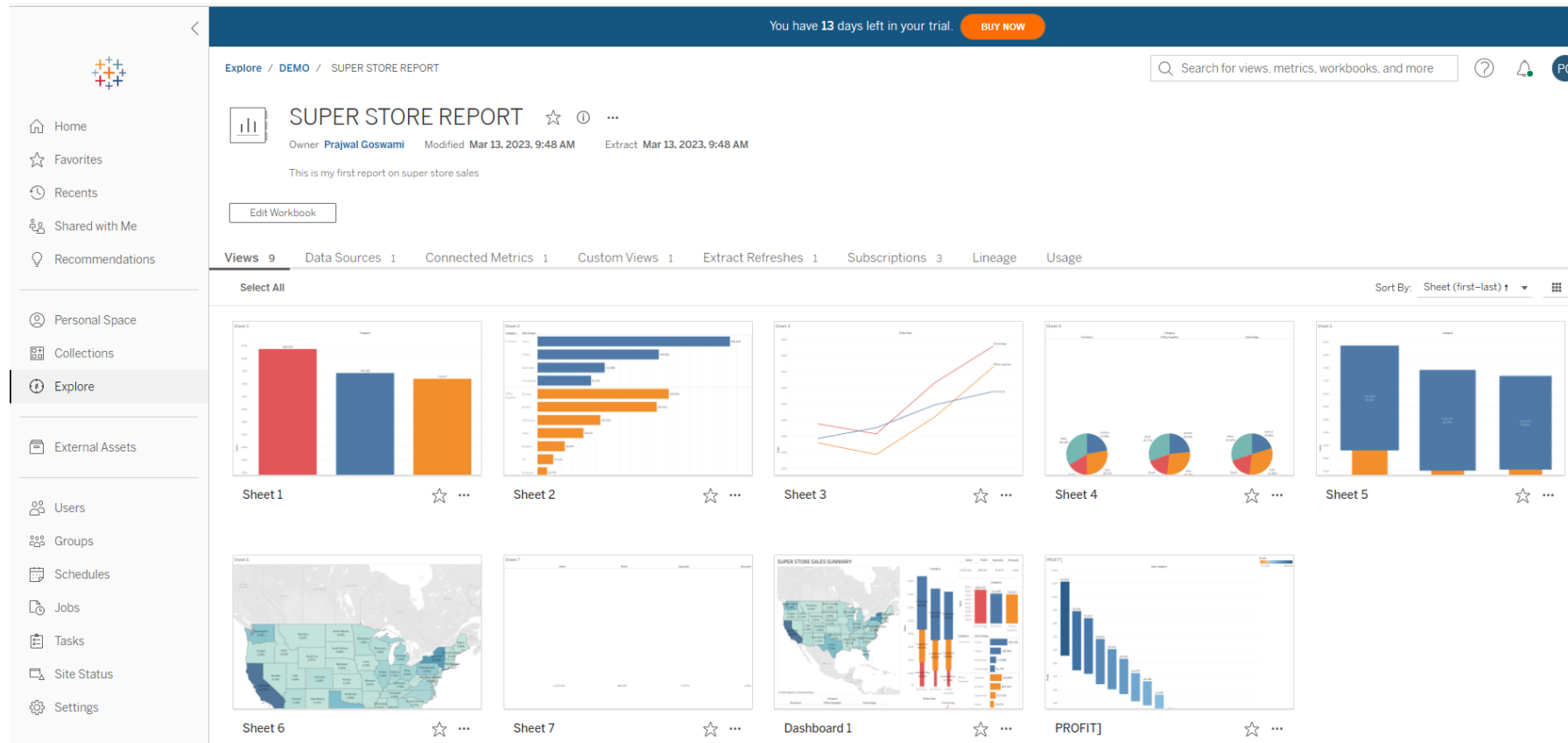
☒ Show selections

Publish

Publishing

Once the workbook is published all the visuals will be on tableau online and will be machine independent.

The visuals will be as dynamic as in the tableau desktop.



Publishing

Once the visuals available on tableau Online, below actions can be performed:

- Share
- Download
- Comment
- Watch – Subscription
- Watch – Metrix
- Watch – Alerts
- Managing Views
- Editing

Share View

Dashboard 1

Only people with permission can see this view.

Share with people

Enter a username.

Share using a link

<https://us-west-2b.online.tableau.com/t/prajwaltableau/views>

Copy Link

</> Copy Embed Code

Copy Site ID



- Image
- Data
- Crosstab
- PDF
- PowerPoint
- Tableau Workbook



Thanks!

**EVERY ENDING
IS REALLY JUST A
NEW BEGINNING**



Rajeev Garg
Data Analytics Trainer